

TOWN OF WELLESLEY



MASSACHUSETTS

CONTRIBUTORY RETIREMENT SYSTEM

TOWN HALL • 525 WASHINGTON STREET • WELLESLEY, MA 02482-5992

The Wellesley Retirement Board (WRB) is seeking a law firm or attorney with experience representing Massachusetts public pension boards or systems to provide legal services. The WRB serves the retirement system for the Town of Wellesley and the Wellesley Housing Authority. The attorney or law firm must possess knowledge and proficiency with MGL Chapter 32 and PERAC Regulations CMR 840.

Attorneys/Law firms must submit a proposal to be considered. The information submitted in the proposal, including experience, qualifications and fee schedule will be reviewed for the purpose of selecting a firm to provide legal representation. Please refer to the instructions on the second page. Favorable fees will be a factor in the selection process; however, the attorney or firm's experience, qualifications, resources, and level of proposed services will be key factors in determining the firm to represent the WRB.

It is anticipated that the WRB will select one attorney or firm that will serve for a seven-year period. The Retirement Board will act as the qualifications-based selection committee. The selection committee will evaluate the proposals as highly advantageous, advantageous, not advantageous or unacceptable based on the evaluation criteria and will state reasons for the rating. The selection committee will then develop a composite rating. After review of the composite rating, the WRB will conduct interviews of the three highest composite rated attorneys or firms. After the composite rating and interview process, the WRB will designate its choice of attorney or firm. The Retirement Board will ultimately negotiate an arrangement for services with the selected attorney or firm.

The WRB reserves the right to reject proposals or parts thereof. The WRB also reserves the right to waive any irregularities, inconsistencies and bidding provisions or take whatever other action that is in the retirement system's best interest as determined by the WRB.

The selected attorney or firm must file all disclosures as required by the Public Employee Retirement Administration Commission as part of the RFP process. These disclosures include a disclosure of arrangements for compensation paid or to be paid to the attorney or firm or a related person in connections with the services the attorney or firm provides to the retirement board or any other client; a disclosure of compensation in whatever form paid or expected to be paid by the attorney or firm or a related person to others in relation to the services provided to the retirement board or any other client; and a disclosure of any conflict of interest that the attorney or firm may have that may interfere with the ability of said attorney or firm to provide unbiased and objective services to the WRB.

Interviews are tentatively scheduled to occur on September 28, 2021. Candidates selected for an interview should make available a representative attorney who will be the primary contact person for the WRB. The WRB hopes to select an attorney or firm and negotiate a service agreement no later than September 30, 2021.

Your original proposal, and an electronic version (PDF file preferred) along with a separately sealed envelope containing fee information, should be submitted on or before 1 p.m. August 23, 2021 (the "submission date") in one sealed package or envelope. The proposal should be marked "Legal Services RFP" and delivered to the attention of Lynn Whynot, Retirement Administrator, Wellesley Retirement Board, 525 Washington Street, Wellesley, MA 02482.

Each proposal shall be considered binding and in effect for a period of ninety (90) days following the submission date. Thank you in advance for your consideration of this request. Please do not hesitate to contact Lynn Whynot at lwhynot@wellesleyma.gov or (781) 489-4238 should you have any questions.

INSTRUCTIONS FOR SUBMITTING A PROPOSAL

A. Generally, the proposal may cover any areas which you deem to be relevant. The Legal Services RFP should not exceed twelve (12) pages and should minimally include the following information:

- Provide a summary of related legal experience including a list of current or former Massachusetts public retirement board or system clients. Said list, should include the commencement date and end date of representation with each client.
- Provide the name and brief biography of attorneys who will be generally responsible for providing related legal services including, but not limited to, years in the practice of law, education and other relevant background information.
- Describe the firm's policy on staffing for deposition, trial work, and rate increases, if applicable.
- Describe any potential conflicts of interest, whether past or pending, which exist with the Wellesley Retirement Board (WRB) or its members.
- Vendor Certification Form. The proposal process is governed by the provisions of 840 C.M.R. 16.08 therefore any response must include the following certification:

“The undersigned certifies under the pains and penalties of perjury that this proposal has been submitted in good faith and without collusion or fraud with any person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, club or other organization, entity or group of individuals.”

Signature of individual submitting response

Name of Firm

Date

B. The separate information relative to fees should:

- List your hourly fees.
- List charges, if any, for telephone calls, file review, copying, facsimile, transmission, messenger service, etc.
- Describe the attorney or firm's billing procedures and terms.
- List those items for which the firm will expect reimbursement including, but not limited to travel related costs.

Submit the original proposal and an electronic version (PDF preferred) to:

**Wellesley Retirement Board
Attn: Lynn Whynot
525 Washington Street
Wellesley, MA 02482**

The proposal should be marked “Legal Services RFP”. Your submission must include the fee information in a separately marked envelope.

Proposals are due on or before 1 p.m. August 23, 2021.